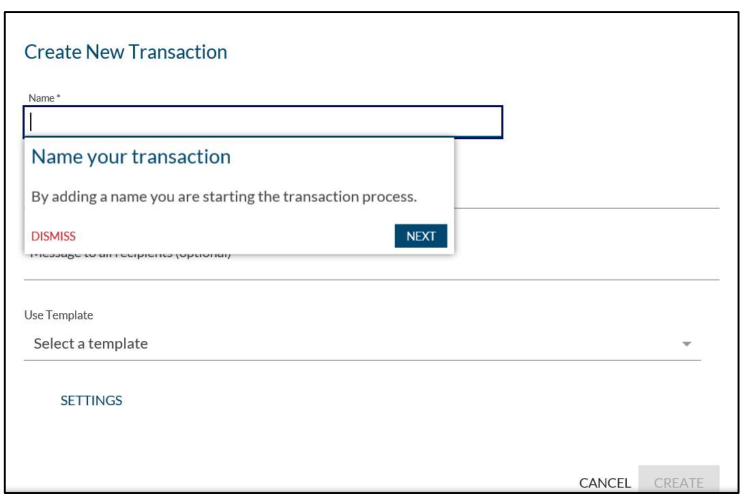
eSignature Solution
Tip Sheet: Creating eSignature Transactions

This tip sheet contains the high-level steps for creating an eSignature transaction. A transaction is an eSignature process that results in a signed document(s). The sender's agency is charged for each transaction that is sent using the eSignature Portal.

Accessing eSignature Portal
Go to MiLogin and select Enterprise eSignature Sender. Note: Senders are encouraged to use the Google Chrome or Microsoft Edge internet browsers.

Creating Transactions
In the dashboard, click on the "New Transaction" button, and the Create New Transaction screen will open.

Naming Transactions
The transaction name is a required field. See the Naming Transactions Tip Sheet for important information about naming strategies for transactions. Once your transaction is named click the Create button.



Adding Document(s)

Each transaction can contain one or multiple documents. To add document(s), either drag and drop the files to upload, or click on the “Add Document” plus sign to navigate to where the documents are stored. Note: By default, the Electronic Disclosures and Signatures Consent form is attached to each transaction.

The documents will be listed in numerical order. Re-arrange the document order as needed by dragging the document up or down the list.

Adding Recipients

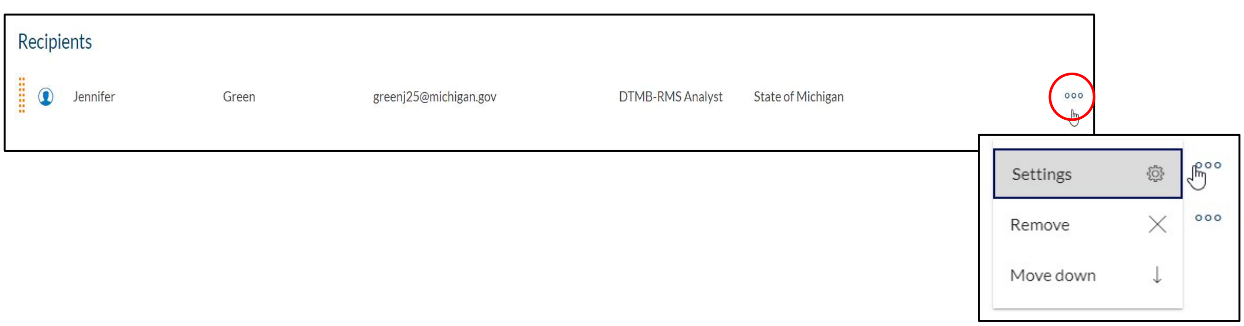
After the document(s) are added to the transaction, add the recipients (signers and reviewers) to the transaction. When adding recipients, First Name, Last Name, and Email are required fields. Note: the portal will remember recipients that were used in previous transactions.

Parallel Signing: If the transaction should be sent to all recipients at the same time (concurrently), do not click on the Set Signing Order slider.

Sequential Signing: If the recipients should receive the transaction in the order of the list (consecutively), click on the Set Signing Order slider. Change the signing order by dragging a recipient up or down on the recipient list.

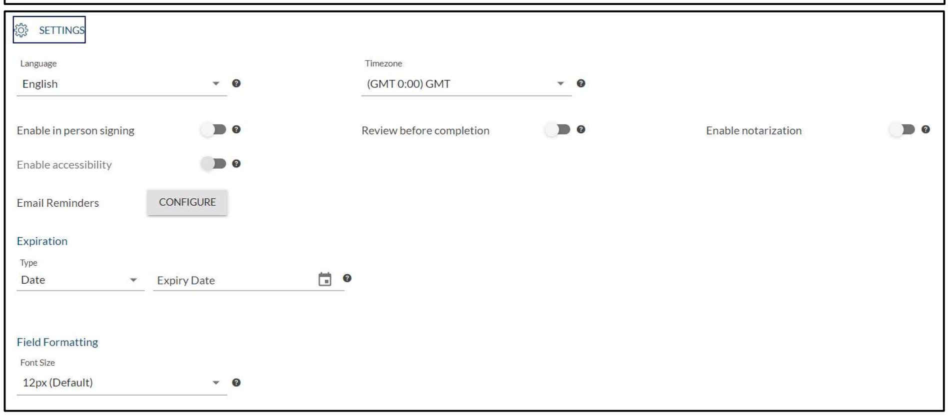
Recipient Settings

Review and customize the settings for each recipient by clicking on the 3 dots to the right of the recipient name and selecting Settings.



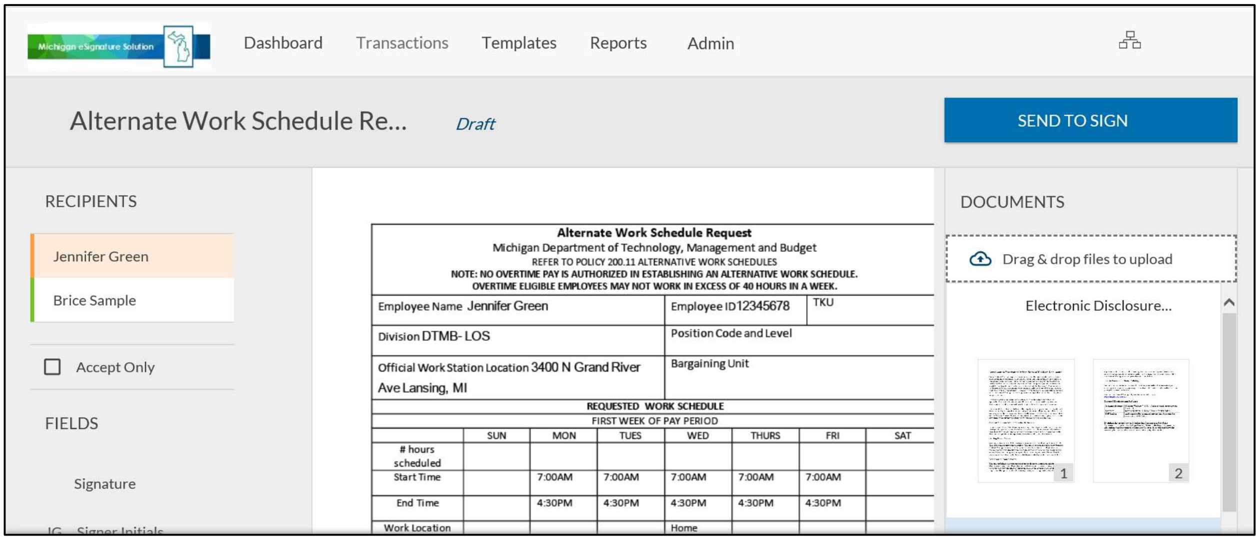
Transaction Settings

Click on the SETTINGS button at the bottom of the create new transaction screen to review and modify the Transaction Settings. Most transactions will not require the use of these options.



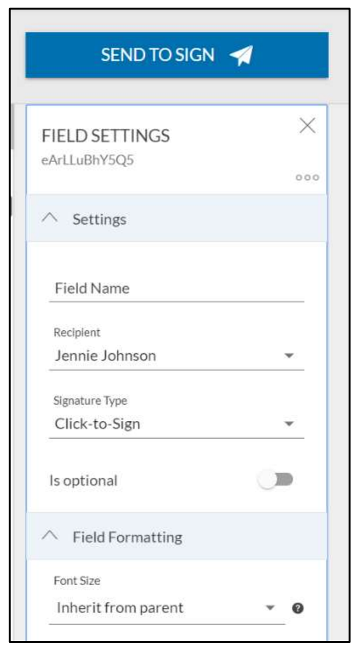
Designer Screen

Click the Next button in the Create New Transaction screen, and the Designer screen will open. The Designer screen has three sections: Recipients and Fields are on the left side, the document(s) to be signed are in the middle, and documents and settings are on the right side. The Designer screen is used to designate the actions that recipients will take when receiving the document. If no actions are assigned to a particular recipient, they will receive the transaction for review, but it will continue with the workflow without waiting for them to do anything. If a recipient must take an action, they must either sign or initial the document in addition to the other tasks.

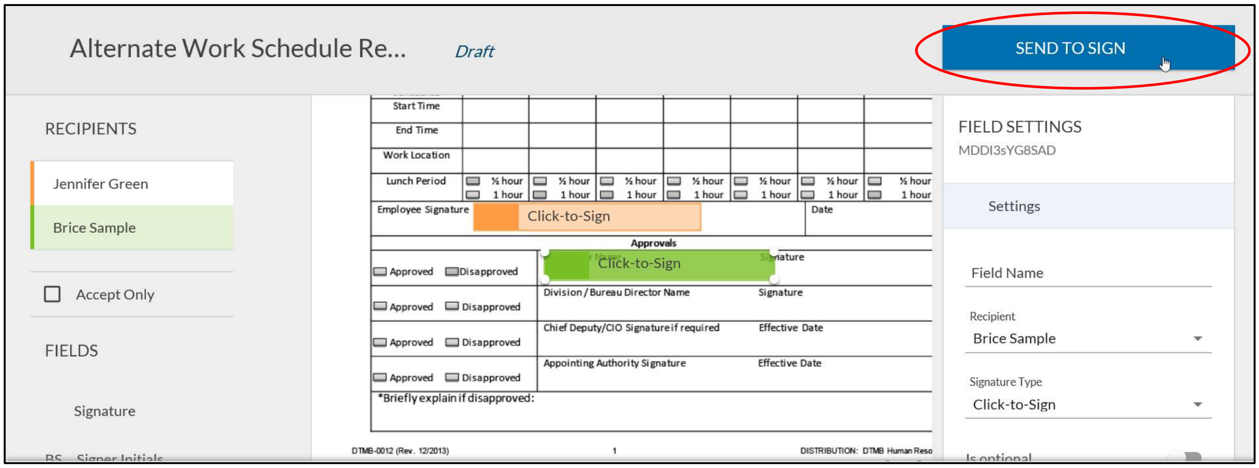


Each recipient is assigned a unique color code for the fields that they need to take action on. First, select a recipient, then choose the fields below that apply to that recipient. The recipient's signature or initials must be enabled before other fields are available.

Once a field is highlighted, the "Field Settings" become available on the right side. These settings can be used to make a field required or optional, to allow different types of signatures, to specify the values of drop-down fields, and more.



Once all of the necessary fields are added to the document(s), the transaction is ready to be sent for signing. Click "Send to Sign." A confirmation screen will pop up asking you to confirm sending the transaction. Click send.



Transaction Starts
Once the transaction is sent, the recipients will receive an email inviting them to the signing ceremony. Recipients will be prompted to complete the transaction by signing or filling out the fields specified on the document(s).

After the recipient(s) complete their role in the signing ceremony, the document will indicate the transaction is complete, and each recipient will be able to view the document(s).